



## Memorandum

**To:** Anne Teresa, FSA

**From:** Howard Weitzner, Accenture

**Date:** May 31, 2002

**Subject:** Deliverable 95.1.1d Training Services Summary

### **Purpose**

This memo summarizes the results of Training Services provided to FSA University during the period May 1 – May 31, 2002. The results were delivered through supporting materials and working sessions with FSA University staff. The work effort addressed improvements to FSA University's training services, processes and systems.

### **Initiatives this Period**

Specific initiatives addressed during this period included:

- FSA University strategic planning and organization development
- Training development and delivery methodology/process team
- Delivery cost assessment
- Performance (Learning) consultant
- Effective teams
- LMS Support
- Online performance tools

### **Planned Initiatives**

During the period June 1 – June 30, 2002, the following initiatives may be addressed, but not limited to:

- FSA University strategic planning and organization development
- Training development and delivery methodology/process team
- Training team(s) support
- Delivery cost assessment
- Performance consultant
- Effective teams
- Online performance tools

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**Description of Initiatives**

***FSA University strategic planning and organization development***

Underlying several initiatives is ongoing support for FSA University's efforts to develop and enhance its organizational effectiveness. Activities continue to focus on aligning FSA University's activities with the strategic goals of the organization. During this performance period emphasis has been given to aligning standalone initiatives. For example, the cost analysis, effective teams and training process efforts are being aligned to help the training team leads budget, plan and manage the team's work efforts. Next steps may include enhancing the rigor and accountability of action team status reporting and milestones review.

***Training development and delivery methodology/process team***

The Training Development and Delivery team supports the creation and implementation of best practices for how FSA University develops and delivers training. The methodology (Plan, Design, Build, Deliver, Assess) follows a customized version of the ADDIE model (Analysis, Design, Develop, Implement, Evaluate).

During this period, the process team conducted its final review of Build, Deliver, and Assess phase materials. These documents will be ready for sponsor and stakeholder review during the first week of June, and a session to gather comments is scheduled for June 17, 2002. The following target dates serve as the guiding deadlines for the team:

- June 4: Target date for completion of materials
- June 7-14: Sponsor/stakeholder review of materials
- June 17: Review session with sponsors/stakeholders
- June 17-21: Revise materials to incorporate sponsor/stakeholder input
- June 21: Post final materials to eProject
- June 24-28: Present final materials to sponsors/stakeholders; conduct celebration
- June 24-July 8: Communications team enhancements to materials
- Mid-July: Workshop for 2002-2003 training team leads

Specific activities during this period included:

- Review and refinement of materials for the Build, Deliver, and Assess phases
- Development of the deployment strategy for the training process

The next phases of work may include:

- Final review(s) of materials
- Packaging of materials for use by training teams
- Development of workshop for training team leads

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***Delivery cost analysis***

The cost analysis team adheres to the FSAU operating model: Plan, Design, Build, Deliver, and Assess. During this performance period, the team focused on the Deliver phase. This includes presenting an introduction and a demonstration of the Cost Analysis Tool (CAT) at the FSAU Manager's meeting and planning future presentations to other audience groups. Additionally, the team continues to define a deployment strategy for the CAT. The team has been working with the Training Process team to identify an approach for team leads and CORs to effectively manage teams by utilizing information/reports from the CAT.

Next month the team plans to continue integrating the tool with the training process deployment and will deliver the overview presentation at the next FSAU All Hands meeting.

Activities during this period included:

- Identification and development of the communications presentation to deploy the cost analysis model
- Support the collection of final cost data and development time for Fiscal Management Training (FMT)
- Work with Training Process team to define role of CAT
- Review and revision of the tool

Specific activities in the next period may include:

- Demonstrate the tool to FSAU staff members at the next All Hands meeting
- Work with Training Process team to define possible role of CAT in the process
- Deliver tool version 1.3
- Assess FMT training course costs and determine areas where costs can be reduced
- Collect assumption data for Tools for Ensuring Program Integrity training (TEPI)
- Assess tool version 1.3 success and revise approach

***Performance (Learning) Consultant***

During this period, the performance consultant team conducted a workshop for FSAU managers. During this workshop, FSAU managers learned the overall purpose and vision of the performance consultant role, steps involved in its enactment, and needs assessment techniques. This session prepared them to represent FSAU to the organization, conducting needs assessment interviews and publicizing FSAU's products and services. The team also created a Proposal Request form for use by participants and presented its first project opportunities to the Review Board.

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### ***Effective Teams***

During this period, the Effective Teams initiative focused on providing continued one-on-one project management and planning coaching to the pilot team leads. In addition, the team developed a strategy to implement the use of status reporting across the organization during the month of June. Other activities included:

- Provided one-on-one coaching to team leads on project planning and management
- Developed process for submitting status reports and worked with FSA U Chief of Staff to implement the process
- Determined appropriate Team Leads to complete Status Reports
- Presented Status Reporting roll-out schedule to managers and obtained their approval
- Presented Phase II initiative at FSA U All-Hands Meeting
- Created "Mission: Possible" presentation for kick-off
- Distributed project management templates and status reporting tools to FSA U staff at All-Hands Meeting
- Met with PICT Training Team to determine appropriate roles, responsibilities, and team agreements. The team will work with the PICT Team to provide coaching and coordinate efforts of each training session
- Determined FSA U employees to attend Covey Project Management Training on June 20-21

### ***LMS Support***

Ongoing support to complete the transition of ownership of the LMS to FSA University was completed. With the LMS operational, FSA University Services personnel have assumed responsibility for the day-to-day training and system administration. As questions and issues have been raised, ad-hoc support in the areas of reporting, usability and security have been provided. In partnership with FSA CIO, FSA University and Jamcracker a resolution for the user directory issue was identified and will be implemented during June 2002. In addition, a presentation describing the benefits and scope of the LMS was created and delivered to FSA senior leadership and the AWG (Architecture Working Group).

### ***Online Performance Tools***

These tools provide performance support or enable work in a variety of formats. In this period, the team supported FSAU's consideration of eProject and Realize as online performance tools. Regarding eProject, the team continued to identify requirements to better understand eProject's application and utility for FSAU. The team also provided FSAU with access to Realize to assess its potential effectiveness and appropriateness as a management/leadership support tool.

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**Observations/Recommendations**

During the period May 1 – May 31, the following observations were identified and will be reviewed to determine the potential impact/value for FSA University:

- Coaching of project team leads and members will assist in their understanding and enactment of new tasks and approaches. For example, with the training process, it is advisable to have a training process team representative work closely with a team lead to ensure proper use and completion of tools. This both builds the team lead's confidence in the tools and heightens the likelihood of their long-term use.
- Integration of different efforts has proven helpful. When initiatives from the training process team, effective teams, or cost analysis tool overlap, tools are shared and concepts incorporated. This benefits teams in several ways, including simplifying the task of learning new techniques, since they are similar to others employed. Similarly, this creates a commonality and usability that enhances the durability of different approaches.
- To improve planning and efficiency of project management, it would be constructive for FSA University to periodically review the allocation of personnel to tasks. Similar to the resource planning completed during October 2001 as part of the action planning process, it is recommended that this become a periodic planning exercise.

**Attachments:**

- Training Process Team
  - Checklist
  - Phase overviews
  - Phase flow chart
  - Team summit agenda
- Performance (Learning) Consultant
  - Performance consultant workshop agenda
  - Performance consultant workshop presentation
  - Proposal request form
- Effective Teams
  - All Hands Meeting: Phase II kick-off presentation
  - Project description template
  - List of status reporting teams
  - Phase II roll out strategy: Timeline & Milestones
  - PICT team roles & agreements
- LMS
  - Senior Leadership/AWG presentation